

Business Practices Technical Forum
Scheduling Practices Work Group Meeting of January 16, 2003

Lorie Hoffman kicked off the meeting with some background: a review of upcoming meetings, materials from the first Business Practices Forum, where ongoing information can be obtained, etc. Specifically, Lorie noted or discussed:

- The next meeting is at 9:00-12:30 on Real Power Losses, on the 21st of January
- The norms and principals that were developed at the Kick-Off Forum on December 11, 2002, were provided as a hand-out
- The Business Practices Technical Forum website has background for all remaining meetings
- The driving factor for the Business Practice Forums is a result of the rates process where Bonneville agreed to address specific issues throughout 2003. While the Scheduling sessions might go a bit further than that commitment, Bonneville staff will work with its customers to address their concerns.
- The intent of the Scheduling meetings is to listen and address issues. Staff will however stay focused on the bottom line – Staff will therefore listen, evaluate, and get back to you with actions
- These meetings are good for dialog
- Leadership for all meetings was addressed. Lorie asked if the group wanted to self-select a leader – the group identified her as the lead. Therefore, Lorie will do the agendas and schedule rooms
- The next Scheduling Practices Work Group meeting will address 1) Internal Constrained Paths 2) STF Redirects for PTP as John Anasis could not make this meeting
- Look for postings on all meetings
- February 7 is the date for the overall Forum to get together again to review what each working group has accomplished... look for the posting

Issues Addressed: The group moved to address the issues identified at the first Forum meeting for this workgroup.

1. **Tagging** Passive approval of tags and accepted schedule of tag is not accepted by TBL. This issue was identified by Scott Brattebo of PacifiCorp (but he did not get back to us).

The sponsor of this issue was PacifiCorp and without their attendance, the rest of the work group tried to recall what the issue was. It was noted that this same issue came up during one of Bonneville's recent tagging conference calls. These calls are sponsored approximately once a month to help address tagging issues and help Bonneville allow a smooth transition to No-Tag-No-Flow.

It was noted that Bonneville intended to cover this issue during the next upcoming conference call. After some discussion it was agreed that the conference call forum was the appropriate place to discuss the issue. It was also agreed that Bonneville would try to call PacifiCorp to assure that the issue was completely understood.

New Issue: Tagging in general

Rick Paschal spoke about his concerns about tagging in general noting that the big picture seemed to be slipping away. He noted that we get so wrapped up in the process that we forgot what we wanted it to do. The industry seems to have lost the idea about reliability and have gotten wrapped around the axle on XML etc. NERC requirements don't help. Additional issues:

- There are constantly problems
- It is redundant
- Software issues are constant
- Etc.

Rick further noted that it was time for someone to address the issues and create a new vision for how to schedule successfully with an appropriate commitment of resources.

The group generally discussed the current industry philosophy for tagging and while there was general agreement about the problems with illustrations such as duplicate tags (because of batch issues at TBL while not at PBL), this was something that the group could not take on with a concrete result. Participation in various committees such as WECC is, for the time coming, where something would get done.

It was agreed that it was not an issue for the Scheduling Work Group to address.

2. Tagging: Intermediate transfer party included in tag should have say so to deny the tag

While this was an issue identified for the Scheduling Work Group to address, noting it as a major flaw, it was noted that this was not in Bonneville's purview to address. Rather it was noted that NERC addresses this type of issue. Shirley Buckmier further noted that this issue will go to the WECC where they create Business Practices for unique western issues.

This issue was closed by the group due to its not being within its purview.

3. Account Building: TBL elimination of "inactive" accounts is a problem

There was extensive discussion about the concern among meeting participants about the extent to which Bonneville deletes account #'s in its scheduling system. The concern --- that accounts that participants require to schedule could possibly have been deleted just when they are needed by customers.

In responding, Bonneville noted that TBL can only handle 80,000 accounts in RODS. Therefore as that limit comes close, Bonneville looks at the older accounts for possible deletion --- those that have not been in use for 18 months. Bonneville further noted that the number of accounts is currently at 50k, thus there won't be any eliminated now.

Proposal: In trying to generalize the discussion, the group tried to address a policy that could be documented and that all could understand and follow. The group suggested that before an account is deleted that Bonneville would call the TCH and any entity associated to get approval. Phone and email would be used to get approval.

The group further noted that "time not used" is not the sole criteria that should be used. As an example, because the resource base in the northwest is largely hydro, which is variable, no one should be surprised that an account has not been used for quite some time.

In brainstorming solutions, one last idea offered by work group participants was whether Bonneville could put “old accounts” in an inactive status for use when needed? Bonneville indicated that this was not a possibility.

This issue was not closed. The proposal needs further fleshing out and final agreement.

4. Account Building: Account building after hours

As a result of past discussions on this issue and in anticipation of the work group discussion, Lorie handed out a proposal for account building hours. Lorie proposed to expand hours to include preschedule hours on Sat and Sun. Further, in October, Bonneville would go to a 24/7 account building process.

In evaluating the proposal, there was extensive discussion about the account building process, RODS, and Bonneville’s long anticipated new scheduling system. While a number of suggestions were offered to assist Bonneville with account building, because of resources and technical issues, they did not stick. Several of the ideas are captured below:

- Only require two accounts --- one for firm and the other non-firm
- Can the new system build new accounts on-line?
- Can dummy accounts be built that can be used in specific situations?
- Can accounts be built in Real Time during critical periods?

While the Work Group appreciated Bonneville’s’ willingness to listen and propose suggestions, there was a general sense that the proposal did not go far enough. Several participants were interested in why it would take so long to get to 24/7. There was a general appreciation that it takes long to train staff but that given the importance of accounts to scheduling, customers wanted other alternatives. They noted that the biggest time of concern was during emergencies such as cold fronts. If a new account could not be prepared in these situations, participants were concerned about reliability. It was also noted that as a part of the Tx service customers expect from Bonneville, they expect to be able to use the Tx system when they need it most. If accounts can’t be built during important times, then perhaps customers should not have to pay for service at those times. It was noted that if the event ever occurs that prevents Tx use because an account could not be built, that the PNGC would not pay their bill for that period.

In closing the discussion, Lorie indicated that during emergencies, Bonneville staff have pagers, and that Bonneville would provide coverage. This will be added to the proposal that Lorie introduced. The proposal will be run by TBL’s Rapid Response Team (RRT) and will be posted in the near future.

5. OASIS doesn’t reflect long-term commitments

Bonneville did not have sufficient background to address this topic. Work Group participants indicated that this was important and requested Bonneville to add more manpower to address this. They generally indicated that the OASIS doesn’t provide enough information. Bonneville indicated that they would look into this, balance resource commitments and report back to the group.

6. Contract demand limits between TBL and transmission customer

This discussion was oriented towards Bonneville's requirements for Unauthorized Increases (UIC). If demand limits were an automated part of Bonneville's scheduling system, then UIC's would not be prevalent. The participants generally indicated that there was no deliberate intention to exceed their demand limits, but most frequently because of inadvertent mistakes this occurs. A proposal was offered: as a first test "did it harm the system?" then "was non-firm available? If these are affirmative, then a UIC should not be rendered.

While Bonneville noted that, once tagging is in place (Path demand will do it), this should be minimized.

The Work Group agreed that this solution should be more than a maybe, but actually a firm procedure --- that doesn't allow a schedule tag if there is no transmission.

This issue was not closed. A firm proposal needs further fleshing out and final agreement, given resource commitments at Bonneville.

7. Reconciliation process behind billings

This topic resulted in a discussion about Bonneville's After the Fact (ATF) current status. Bonneville is currently in July and it could take awhile to complete these because during this month there were lots of curtailments on the Intertie. After July things will clear more easily. Lorie explained that TBL is continuing to address ATF issues by:

- new staff
- different processes
- * especially if we do it now rather than later

In general, participants were sensitive to Bonneville's plight and offered their assistance, recognizing that it simply needed to be gone through and completed.

8. Concern on system changes

A number of items were discussed relevant to this topic. Participants generally wanted to keep apprised of developments so that they could prepare to assure that scheduling issues are kept to a minimum. Many of the issues identified by the Work Group were issues raised during conference calls as well:

1. NERC timelines
2. SW timelines
3. Seams issues

Comment - When a tag is scheduled, timelines are not consistent across transmission providers and control areas.

The participants were all very interested in getting fully briefed at a very detailed level about Bonneville's new systems developments. While Lorie indicated that there would be a general presentation at the next Forum meeting in February, the group indicated they wanted more detail, than they would likely get from the entire Forum.

During the discussion several proposals and several questions were offered. These are noted below:

Proposal – Buy all transmission on OASIS, including hourly products. OASIS has significant benefits especially if unique tags are required for some schedules versus simpler schedules only requiring one tag. If these compete in an hourly products arena, this could be important. Testing is important in order for these issues to be revealed prior to full implementation.

Question – It would be useful to see all of the developments at a detailed level. Can this be accommodated?

Proposal – All system evolutions need to be simulated not just implemented.

Question – If Bonneville can't implement No-Tag-No-Flow in the spring, will it be TBL's decision to wait until fall? Is the fall OK?

Question – It appears we have a significant timelines issue: BC Hydro has their own, Bonneville has theirs, and the ISO has theirs. At times these timelines cause significant conflicts.

Meeting Summary

The group agreed to do a follow-up meeting on the 27th to address the other items not discussed during this meeting:

- Internal constrained paths
- CAISO supplemental market schedule changes within the hour
- ST firm redirects for PTP

Additional topic requests should be emailed to Cathy Ehli at Bonneville.

The meeting was adjourned.